

**Scoring Criteria 1: Qualifications/Expertise of Firms on Team**

Min pts 0 : Max pts 20

Minimum Qualifications

The I-405 Travel Options Consultant (TOC) must demonstrate expertise and experience in the following areas:

- Management of complex, multi-faceted projects for all phases of a project's life, from design, implementation, and evaluation to project closeout
- Travel options/TDM program and project design
- Travel options/TDM program and project implementation
- Travel options/TDM program and project monitoring and evaluation
- Managing, providing oversight and supporting development for design, implementation and evaluation contracts with on-call, RFP or sub-consultants, sole source agreements, and agreements with public sector agencies and private sector entities as an owner representative (includes contracts developed by either TOC or others; contract execution by WSDOT as owner)
- Communicating, involving, and coordinating with many different groups, ranging from working with groups of elected officials to working one-on-one with individuals
- Organizational development (project management, schedule / work priorities development and management, budget management, project delivery organization development, roles and responsibilities of integrated WSDOT/TOC team, etc.)
- QA/QC and other project controls (scheduling, cost control & estimating, document control, general accounting, budgeting, etc.)

Desired Qualifications

TOC expertise and experience in the following areas are desirable:

- Understanding of sensitive and local issues in the I-405 corridor
- Extensive and broad knowledge of travel options/TDM gained from substantial experience working in the TDM field, including extensive experience developing, implementing, managing and evaluating TDM programs and projects
- Proven track record in team-building with external partners to major projects

A. Include the following items:

- Provide a listing of all firms on your proposed team;
- List the type(s) of expertise that each firm on your team can provide;
- How long has each firm on your team provided these type(s) of expertise;
- For each firm on your proposed team, provide the number of employees within the state of Washington (including the Greater Portland Metropolitan Area). Also, provide the number of employees that each firm on your proposed team has nationwide; and
- Provide organization chart of your proposed team and include the respective roles that each firm will provide for the team.

- B. Include the following items:  
Provide listing of each team member's offices within the state of Washington (including the Greater Portland Metropolitan Area), include the total number of employees within each location and the types of expertise that is available at each location.
- C. Include the following items:  
Has the prime consultant worked with proposed sub-consultant(s) on similar projects in the last three (3) years? If yes, provide name of the project, each firm's role on the project and the dates the services were performed. Limit examples to one (1) project for each sub-consultant firm.
- D. Include the following items:  
Provide table identifying current availability of key staff and resources for each firm on the proposed project team. The availability of staff must be identified as hours available per month for the length of the project, not in percentages of time available.
- E. Include the following items:  
Provide a list of up to three (3) projects that each firm on your project team has completed within the last three (3) years. The project(s) must demonstrate the required expertise needed for this project. Include the work/services provided on the project(s) and the approximate amount received for each project.

**Scoring Criteria 2: Qualifications of Proposed Project Manager**

Min pts 0 : Max pts 20

- A. Include the following items:  
Provide up to three (3) examples for the proposed Project Manager that demonstrates his/her prior experience as a Project Manager on WSDOT or similar projects. Include the date(s) of each project; the name of the client/organization for each project; list the project manager's responsibilities and tasks on each project.
- B. Include the following items:  
Demonstrate the Project Manager's familiarity with relevant state and federal regulations and/or procedures.
- C. Include the following items:  
Provide up to three (3) examples of the proposed Project Manager's ability to manage all of the following within a project:
- Project schedule;
  - Scope of work/scope creep;
  - Budget issues; and
  - Changes that arise throughout the life of the project.

D. Include the following items:

Provide listing of professional licenses/accreditations for the proposed Project Manager; include the year that each license/accreditation was received. Please include the licenses that were obtained in the State of Washington only.

**Scoring Criteria 3: Key Team Members Qualifications (Prime Consultant and Sub-Consultants)**

Min pts 0 : Max pts 40

Key Personnel for the project includes two manager positions: I-405 TOP Project Manager and Implementation Manager. Since the TOC firm will provide recommendations on who does project implementation, **the Implementation Manager – who will not only manage implementation but will be contracted to do implementation of specific projects - must be a sub-consultant to the TOC and cannot be a member of the TOC firm.**

The Implementation Sub-consultant will be contracted to implement travel options projects in areas without existing implementation structure or, where needed, in areas with existing implementation structures. The Implementation Sub-consultant will also be the private sector “face” for the I-405 Travel Options Program.

Key Personnel under the Project Manager include leads for Financial and Incentive Management, Program/Project Design, Program/ Project Evaluation, and Implementation Manager. Key Personnel under the Implementation Manager include Communications.

The activities below are the key delivery areas the TOC is expected to provide. Within each of these areas, there may be many positions to staff. As the project develops, it is expected additional key personnel will be required. Support for each of the key personnel will need to be defined and provided as the project progresses and as budget allows. The TOC staff will be required, at a minimum, to show experience, expertise, innovation, and “not business as usual” skills in executive leadership and technical abilities in the following areas:

1. Project Manager  
*Experience and expertise to lead and manage the delivery of the project;*
2. Financial and Incentives Lead (under Project Manager)  
*Experience in financial management including management of programmatic elements such as incentives;*
3. Program/Project Design Lead (under Project Manager)  
*Experience and expertise to lead design of travel options/TDM programs and projects*
4. Program/Project Evaluation Lead (under Project Manager);  
*Experience and expertise to lead evaluation of travel options/TDM programs and projects;*
5. Implementation Manager (under Project Manager)  
*Expertise to lead implementation of travel options/TDM programs and projects;  
Experience working with various organizations implementing travel options/TDM in the I-405 corridor; and*
6. Communications Lead (under Implementation Manager)  
*Experience and expertise to manage communication and marketing to a diverse*



*audience from small entities to general public including one-on-one individualized marketing.*

**A. Include the following items:**

List each key team member's role/responsibilities on your proposed team, addressing each of the key personnel described above.

- For each proposed key team member, provide up to three (3) examples of prior relevant projects. Include the name of project(s); dates of the project(s); and roles/responsibilities for each team member on those project(s); and
- For each key team member on your proposed team, demonstrate his/her understanding of WSDOT and/or public agency regulations/procedures.

**Scoring Criteria 4: Firm's Project Management System (Prime Consultant Only)**

Min pts 0 : Max pts 5

**A. Include the following items:**

- Describe your firm's Quality Assurance/Quality Control processes;
- Describe your firm's tracking system(s) to monitor the project's budget, cost control and/or scope;
- List your firm's scheduling program/process. Identify the type of software or process and list up to three (3) projects where the proposed Project Manager(s) have utilized this software/process;
- Describe your firm's process for interacting with your internal project team; and
- Describe your firm's ability to provide interaction with your client and/or stakeholders.

**Scoring Criteria 5: Project Delivery Approach**

Min pts 0 : Max pts 45

**A. Include the following items:**

- How does your firm develop a work plan for this project;
- Who is involved with the decision making process for the development of the work plan;
- Describe approach for each of the elements of the proposed work plan for this project, addressing the four phases of work:
  1. Program Design (develop management and project delivery structure; on-going management support; define program goals, objectives, elements and measures; design travel options corridor-wide program, schedule, budget, priorities and structure)
  2. Project Design (design travel options corridor-wide projects; design travel options projects for each of the I-405 "Nickel" and Transportation Partnership Account construction projects; develop design and implementation contracts)
  3. Project Implementation (implementation of corridor-wide and individual projects)



4. Program / Project Monitoring and Evaluation (on-going monitoring, evaluation and reporting on performance of program, individual projects, strategies and incentives).
  - Describe approach for development of the project and financial management and project delivery organizational structure;
  - Describe how your team will address supplementing agency workforce with technical and management support personnel for on-going project, financial and contract management, design and evaluation, and staffing for implementation activities, for an integrated project team; and
  - Describe how your work and staffing plan addresses contingencies that may arise during the project.
- B. Include the following items:  
Describe your approaches to resolve issue(s) within the project team; client(s) and stakeholders.
- C. Include the following items:  
Provide assumptions for work breakdown structure, e.g. WSDOT vs. consultant deliverables.
- D. Include the following items:  
Identify any key issues and critical milestones for the project.

<b>Scoring Criteria 6: References/Past Performances (Prime Consultant Only)</b>
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Min pts 0 : Max pts 20
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- A. Include the following items:  
Provide a minimum of three (3) with a maximum of five (5) performance evaluations each for Prime Consultant and Implementation Sub-Consultant for either WSDOT projects, Non-WSDOT projects, or a combination of both that are either currently active projects or that has a project completion date within the last three (3) years.

If your firm currently has performance evaluations on file with WSDOT, and you wish to utilize those evaluations, please state in your submittal that you wish to use the performance evaluations that WSDOT has on file for your firm and either refer to each WSDOT Y-agreement number or list each Performance Evaluation by Client.

***Performance Evaluations on WSDOT projects:***

If you wish to have a Performance Evaluation completed on a WSDOT project, please contact the WSDOT project manager and have them complete WSDOT's internal Filemaker Pro form 272-019 "Performance Evaluations – Consultant Services." The completed form must be received no later than the submittal due date.

***Performance Evaluations for Non-WSDOT projects:***

If your firm does not have performance evaluations on file with WSDOT, it is necessary to have an evaluation of past performance completed by a client. A copy of the performance evaluation form completed by clients must be returned to the Consultant Services Office



by fax from the client, no later than the submittal due date. A copy must also be submitted by your firm, enclosed in Packet B. You are required to use the WSDOT provided form and have it completed by your client. We will not accept your client version of a performance evaluation form. The WSDOT version of the evaluation form may be obtained by clicking on the link "Performance Evaluation Completed by Reference" which can be found on the main web page for this advertisement.